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Tirzepatide holds firm as dose escalation supports market value in August 2026

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The August numbers suggest continued underlying strength rather than a loss of momentum

While India's GLP-1 market is showing signs of stabilisation, tirzepatide continues to maintain its strong position, accounting for around 62 per cent of the overall anti-obesity market and approximately 72 per cent of the injectable segment, according to Pharmarack Technologies.

The August performance, however, presents an interesting divergence between volume and value. Tirzepatide recorded a slight decline in units, while the value trend remained broadly stable, indicating that lower unit volumes do not necessarily translate into weaker consumption or market value.

According to Sheetal Sapale, Vice President – Commercial, Pharmarack Technologies, one factor behind this trend could be the changing preference for vial formats.

During the initial launch phase, single-dose vials were introduced as a more economical option, helping make the therapy more accessible and encouraging early patient adoption. The market is now seeing a reduced focus on these single-dose vials and greater movement towards multi-dose, including four-dose, vials.

This shift in product mix can affect reported unit volumes without necessarily representing a corresponding fall in the number of patients using the therapy.

A second factor is dose escalation. Patients typically begin treatment at a lower dose and gradually move to higher strengths as therapy progresses. Lower-dose strengths are generally used during treatment initiation, while higher strengths are introduced as patients are titrated upwards.

As patients move to higher doses, the value per injection increases, potentially offsetting a decline in the number of units sold. This helps explain why tirzepatide's August unit trend showed some moderation even as its value remained relatively steady.

The evolving vial mix and dose escalation also point to a maturing market. Rather than being driven solely by new patient additions, tirzepatide's performance is increasingly influenced by existing patients progressing through treatment and shifting towards higher-dose regimens.

This creates a market dynamic in which units and value can move in different directions. A slight decline in units may reflect changes in pack or vial configuration and treatment dosage rather than a straightforward decline in patient consumption.

For tirzepatide, therefore, the August numbers suggest continued underlying strength rather than a loss of momentum. With the therapy maintaining its leadership in both the overall anti-obesity market and the injectable segment, its performance will remain a key indicator of how India's GLP-1 market evolves in the coming months.

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